

MyTax.DC.gov User Guide: How to View Taxpayer and Account Details



Can't find what you're looking for? Enter keywords here to filter.

Business

I want to...

- > Register a New Business - Form FR-500
- > Register a Special Event - Form FR-500B
- > Request a Certificate of Clean Hands

Individual

I want to...

- > Check the Status of My Refund
- > Learn More About DC Freefile/Fillable Forms
- > Respond to Verification Letter
- > View Tax Forms

Real Property

I want to...

- > Make a Real Property Payment
- > Search Real Property by Address or SSL
- > View More Options

Clean Hands

I want to...

- > Request a Certificate of Clean Hands
- > Validate a Certificate of Clean Hands
- > Learn More About Certificate of Clean Hands

Forms

I want to...

- > Submit an Extension
- > View/Retrieve Current Year Tax Forms
- > View/Retrieve Prior Year Tax Forms
- > View MeF Information

Quick Links

I want to...

- > Submit a Customer Service Survey
- > View FAQs
- > View Tutorials
- > Contact OTR

Quick Payments

I want to...

- > Pay with Credit/Debit Card

Resources

I want to...

- > Go to OTR Homepage

Submissions

I want to...

- > Retrieve a Saved Submission or Previously Filed Return
- > Submit Requested Documentation
- > Submit VDA

Tax Law and Guidance

I want to...

- > View Private Letter Rulings
- > View DC Tax Code
- > View Tax Guidance Issued by OTR
- > View Notices

Taxpayer Advocate

I want to...

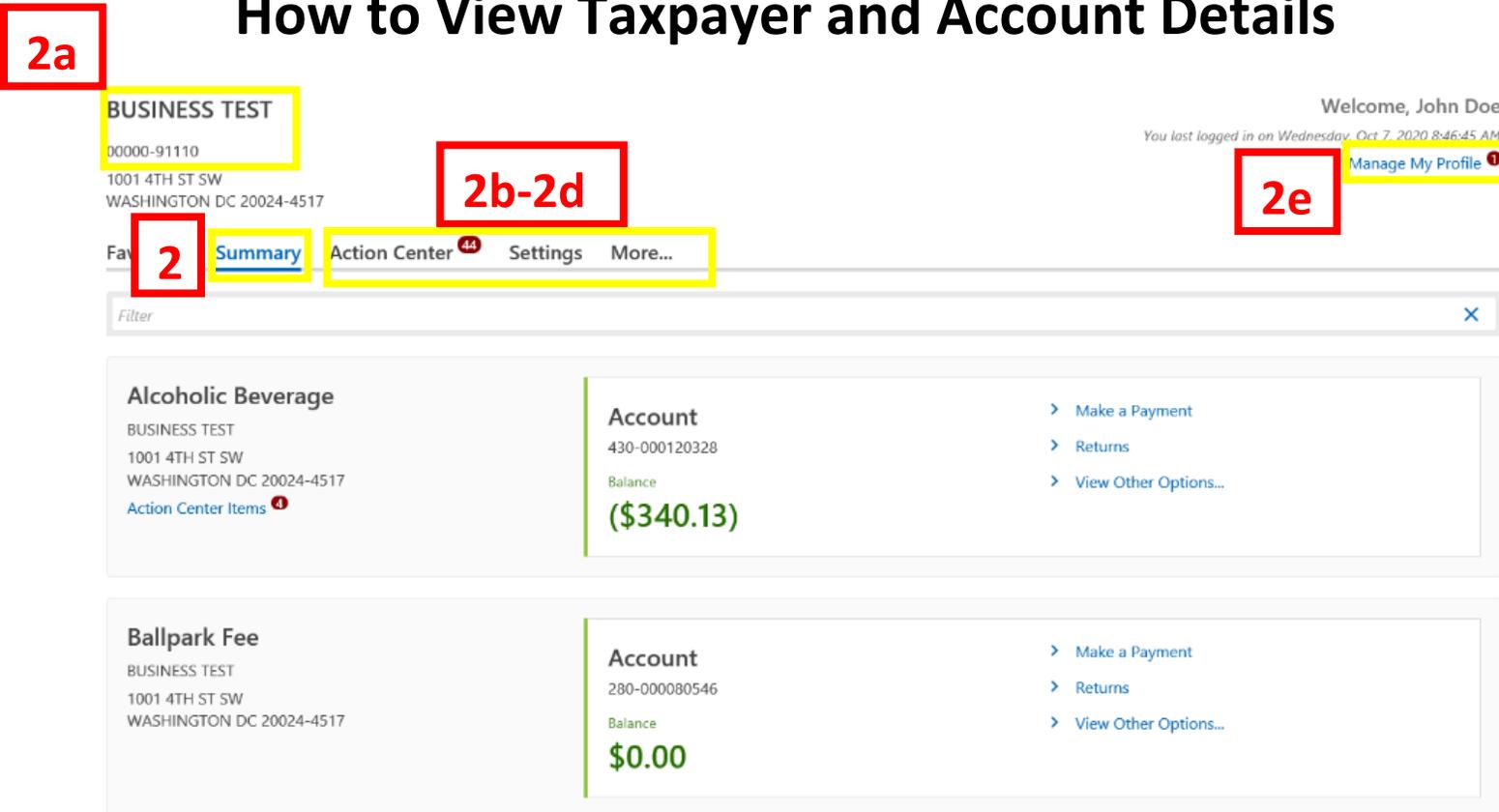
- > View Taxpayer Bill of Rights
- > Request Assistance
- > En Español

More...

I want to...

- > File Form FR-329 - Consumer Use Tax Return
- > Request Government Exemption
- > Request Residential Parking Exemption
- > Search for Certificate/License Exemptions

MyTax.DC.gov User Guide: How to View Taxpayer and Account Details



The screenshot shows the MyTax.DC.gov user interface. At the top left, a red box labeled '2a' highlights the business name 'BUSINESS TEST' and address '1001 4TH ST SW WASHINGTON DC 20024-4517'. In the top right, a red box labeled '2e' highlights the 'Manage My Profile' link. Below the header, a navigation bar contains a red box labeled '2' around the 'Summary' tab, and a yellow box labeled '2b-2d' around the 'Action Center', 'Settings', and 'More...' tabs. The main content area displays two account cards. The first card, 'Alcoholic Beverage', shows an account number '430-000120328' and a balance of '\$(\$340.13)'. The second card, 'Ballpark Fee', shows an account number '280-000080546' and a balance of '\$0.00'. Both cards include links for 'Make a Payment', 'Returns', and 'View Other Options...'. A 'Filter' button is visible at the top of the account list.

1. From the MyTax.DC.gov homepage, log in using your **Username** and **Password**.
 - a. If you do not have a MyTax.DC.gov account, click **Sign-Up to use MyTax.DC.gov** to register for an account (click here to access the “How to Sign up for MyTax.DC.gov” user guide).
2. Upon logging in, you will be taken to your **Summary** page, which refers to your system profile.
 - a. In the upper left corner, your customer identification number and business name are displayed.
 - b. Under the **Action Center** tab, you will find any alerts for this taxpayer which can include balances, open requests, unread letters, and messages for all associated accounts.
 - c. Clicking the **Settings** tab will allow you to change your Security, Mail Delivery, Mail Notification, and Default Payment Channel options.
 - d. By clicking the **More** tab to the right of the Action Center and Settings tabs, you will find an additional list of available self-service options.
 - e. Under **Manage My Profile**, in the upper right corner of the page, you will find a list of available self-service options.

BUSINESS TEST

Welcome, John Doe

You last logged in on Wednesday, Oct 7, 2020 8:46:45 AM

[Manage My Profile](#)

00000-91110
1001 4TH ST SW
WASHINGTON DC 20024-4517

3

[Favorites](#) [Summary](#) [Action Center](#) [Settings](#) [More...](#)

Filter

X

3a

Alcoholic Beverage

BUSINESS TEST
1001 4TH ST SW
WASHINGTON DC 20024-4517
[Action Center Items](#)

Account

430-000120328

Balance

(\$340.13)

[Make a Payment](#)

[Returns](#)

[View Other Options...](#)

3b

Ballpark Fee

BUSINESS TEST
1001 4TH ST SW
WASHINGTON DC 20024-4517

Account

280-000080546

Balance

\$0.00

[Make a Payment](#)

[Returns](#)

[View Other Options...](#)

3. Under the **Summary** tab is a list of all the taxpayer accounts. Let's pick an account to review. For this example, we will select the "Alcoholic Beverage" account.
 - a. On the left side of the page, in the Alcoholic Beverage account section, you will see the business name and address. In some cases, if more action is needed on the account, you will see a link to **Action Center Items**.
 - b. Under the **Account** section in the center of the page, you will see the account number, balance details, and links to **Make a Payment** and access **Returns**. You will also be able to "**View Other Options**".

Note: The first time you access your account, the system will prompt you to establish your **Account Settings**. Choose a "Type of Access" from the drop-down menu and click **Save**.

BUSINESS TEST

00000-91110
1001 4TH ST SW
WASHINGTON DC 20024-4517

4

Welcome, John Doe
You last logged in on Wednesday, Oct 7, 2020 9:12:46 AM
[Manage My Profile](#)

[Favorites](#) [Summary](#) [Action Center](#) [Settings](#) [More...](#)

<p>BUSINESS TEST 00000-91110 1001 4TH ST SW WASHINGTON DC 20024-4517</p>	<p>NAICS code is missing ✕ A NAICS code needs to be added. Add a NAICS Code</p>
---	---

<p>Alcoholic Beverage BUSINESS TEST 1001 4TH ST SW WASHINGTON DC 20024-4517</p>	<p>FR-425 Alcoholic Beverage Tax for 31-May-2020 needs to be filed ✕ A return needs to be filed. Returns filed late may be subject to a penalty. File Return</p> <hr/> <p>FR-425 Alcoholic Beverage Tax for 30-Apr-2020 needs to be filed ✕ A return needs to be filed. Returns filed late may be subject to a penalty. File Return</p> <hr/> <p>FR-425 Alcoholic Beverage Tax for 31-Mar-2020 needs to be filed ✕ A return needs to be filed. Returns filed late may be subject to a penalty. File Return</p> <hr/> <p>FR-425 Alcoholic Beverage Tax for 31-Dec-2019 needs to be filed ✕ A return needs to be filed. Returns filed late may be subject to a penalty. File Return</p>
--	---

4a

4. Click into the **Action Center** tab to view all actions needed for an account. You may be asked to file returns, update business activity codes (NAICS Codes), or add a location address. For our Alcoholic Beverage example, we can see four returns need to be filed for the account.
 - a. Click **file return** to be navigated to the FR-425.

BUSINESS TEST

00000-91110
1001 4TH ST SW
WASHINGTON DC 20024-4517

5

Welcome, John Doe

You last logged in on Wednesday, Oct 7, 2020 9:12:46 AM

[Manage My Profile](#)

[Favorites](#) [Summary](#) [Action Center](#) [Settings](#) [More...](#)

<p>BUSINESS TEST</p> <p>00000-91110 1001 4TH ST SW WASHINGTON DC 20024-4517</p>	<p style="text-align: right;">Cancel Access</p> <p>Security : Administrator</p> <p>Mail Delivery : Paper</p> <p>Mail Notification : Notify me of new mail</p>
--	---

<p>Alcoholic Beverage</p> <p>BUSINESS TEST 1001 4TH ST SW WASHINGTON DC 20024-4517</p>	<p>Account</p> <p>Security : File Returns and Make Payments</p> <p>Mail Delivery : Default (Paper)</p> <p>Mail Notification : Default (Notify me of new mail)</p> <p>Default Payment Channel : None</p>
---	--

5a-5d

5. Under the **Settings** tab is a list of all the taxpayer accounts. You can set the **Security level** for the account, determine your **Mail Delivery Preference**, set your **Mail Notification**, and select your **Default Payment Channel**.
 - a. Click on the **“File Returns and Make Payments”** hyperlink to determine the type of access this account has. You can select **File Returns**, **File Returns and Make Payments**, **Make Payments**, and **View**. You can also use the **“Periods Logon Has Access to”** link to restrict what time frame this account has access to. You can select **All Periods**, **Periods from a Specific Date**, or **Periods within a Specific Date Range**.
 - b. The **Mail Delivery** section will allow you to update your paperless settings. Use the available hyperlink to determine whether correspondence will be sent by US Postal Mail or by email.
 - c. The **Mail Notification** section will help you determine if you are notified of new mail. Use the available hyperlink to choose to be notified of new mail. You can also select **“Do not notify me of new mail”** to turn off mail notification.
 - d. Use the **Default Payment Channel** section to determine which saved payment channel is used to make a payment for this account. In this example we have selected the **“None”** hyperlink to be navigated to our payment channel options. Use this hyperlink to view your **Current** payment channel or **Setup a New Payment Channel**.

BUSINESS TEST

00000-91110
1001 4TH ST SW
WASHINGTON DC 20024-4517

Welcome, John Doe
You last logged in on Wednesday, Oct 7, 2020 9:12:46 AM
[Manage My Profile](#)

[Favorites](#) [Summary](#) [Action Center](#) [Settings](#) **6** [More...](#)

What are you looking for?

<p>6a-6c</p> <p>Submissions Retrieve previously filed returns and requests.</p> <ul style="list-style-type: none"> Search Submissions 	<p>Messages & Letters View messages and letters I have received.</p> <ul style="list-style-type: none"> Send a Message View Messages View Letters 	<p>Payments & Returns Manage payments and returns for my accounts.</p> <ul style="list-style-type: none"> File or Amend Tax Returns Manage Payments Request for Exemption To File (FR-154)
<p>6d-6f</p> <p>Payment Agreement Request or manage a payment agreement.</p> <ul style="list-style-type: none"> Request Payment Agreement Request Garnishment Voucher Update Payment Agreement Bank 	<p>Registration Details Manage registration details.</p> <ul style="list-style-type: none"> Manage Names & Addresses Update NAICS Code Add/Update Officer Add/Update Contact 	<p>Account Management Manage my account.</p> <ul style="list-style-type: none"> Register a New Tax Account Request a Certificate of Clean Hands Submit QHTC Self-Certification Manage a Special Event
<p>6g-6i</p> <p>Bulk Processing Submit tax forms in bulk for other taxpayers.</p> <ul style="list-style-type: none"> Request Access to Bulk Filing 	<p>Access Manage access of accounts I have access to.</p> <ul style="list-style-type: none"> View Access Manage Access Register for DC Estate Tax Access 	<p>Quick Links I want to...</p> <ul style="list-style-type: none"> View FAQs View Tutorials

6. Click into the **More** tab to view more self-service options for an account. In this section you can retrieve **Submissions**, view **Messages and Letters**, manage **Payments and Returns** for accounts, request or manage a **Payment Agreement**, manage **Registration Details**, manage your **Account**, submit **Bulk** tax forms, manage your account **Access**, and navigate to other **Quick Links**.
 - a. Under the **Submissions** section, click the **Search Submissions** hyperlink to locate things you have submitted online for processing.
 - b. Under the **Messages & Letters** section, click the **Send a Message** hyperlink to submit a question to OTR about your account. You can click “**View Messages**” to see previously sent messages and responses. After a message has been viewed, it will be archived. To access archived messages, click the Archived tab. You can also click the “**View Letters**” hyperlink to see an electronic copy of all OTR correspondence. Once an unread letter is viewed, it will be archived. To access archived letter, click the Archived tab.
 - c. The **Payments & Returns** section will allow you to manage payments and returns for your account. You can click the “**File or Amend Tax Returns**” link to review filed returns and amend them if needed. The “**Manage Payments**” link will allow you to review all

- account payments. Use the “**Request for Exemption to File (FR-164)**” link to submit an exemption application.
- d. The **Payment Agreement** section will allow you to request or manage a payment agreement. Click “**Request Payment Agreement**” to setup a payment agreement. **Note:** If you are not eligible to submit a payment agreement online, please contact the Collections Division at (202) 724-5045 for further assistance. If you need a Garnishment Voucher for Employer Payments, you can click the “**Request Garnishment Voucher**” hyperlink to submit your request. You can click the “**Update Payment Agreement Bank**” hyperlink to make changes to the bank account information used for your Payment Agreement.
 - e. In the **Registration Details** area, you can manage the registration details set up for your account. Use the available hyperlinks to **Manage Names & Addresses**, **update your NAICS Code**, **Add/Update Officer**, and **Add/Update Contact**. **Note:** To add/update Contact, you will need to attach an officer signed D-2848 Power of Attorney form by clicking the Add Attachment hyperlink.
 - f. The **Account Management** section will allow you to manage your account. Use the available hyperlinks to **Register a New Tax Account**, **Request a Certificate of Clean Hands**, **Submit QHTC Self-Certification**, **Manage a Special Event**. **Note:** If you are not eligible to request a Clean Hands Certificate online, please contact the Collections Division at (202) 724-5045 for further assistance.
 - g. In the **Bulk Processing** area, you can use the “**Request Access to Bulk Filing**” hyperlink to submit tax forms in bulk for other taxpayers.
 - h. The **Access** section will allow you to manage access of account you have access to. Use the hyperlinks to **View Access**, **Manage Access**, and **Register for DC Estate Tax Access**.
 - i. Use the Quick Links section to **View FAQs** and **View Tutorials**.

BUSINESS TEST

00000-91110
1001 4TH ST SW
WASHINGTON DC 20024-4517

[Favorites](#) [Summary](#) [Action Center ⁶⁴](#) [Settings](#) [More...](#)

🔍 *What are you looking for?*

Welcome, John Doe

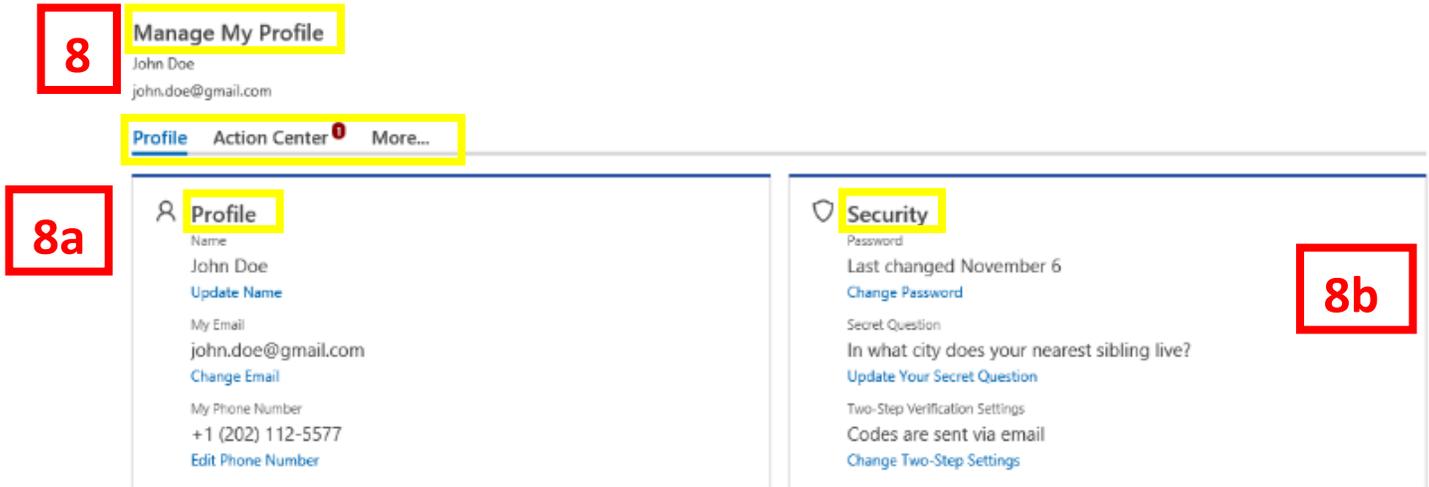
You last logged in on Wednesday, Oct 7, 2020 9:12:46 AM

[Manage My Profile ¹](#)

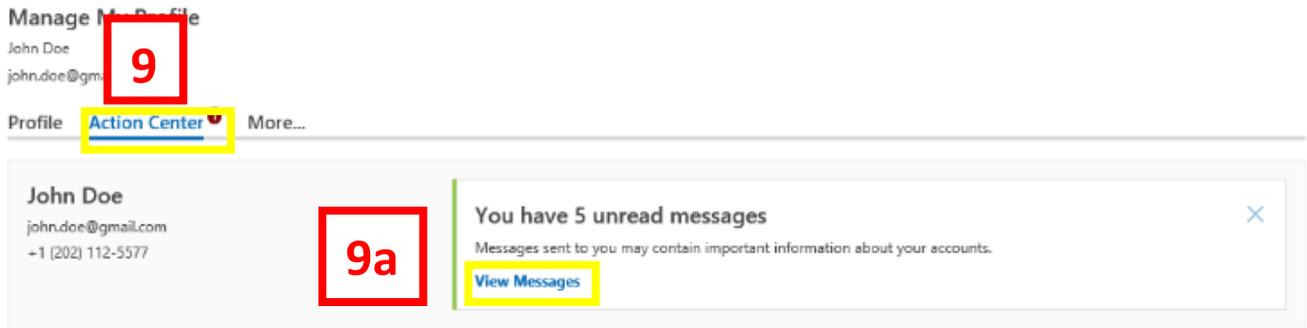
<p>Submissions</p> <p>Retrieve previously filed returns and requests.</p> <p>> Search Submissions</p>	<p>Messages & Letters</p> <p>View messages and letters I have received.</p> <p>> Send a Message > View Messages > View Letters</p>	<p>Payments & Returns</p> <p>Manage payments and returns for my accounts.</p> <p>> File or Amend Tax Returns > Manage Payments > Request for Exemption To File (FR-164)</p>
<p>Payment Agreement</p> <p>Request or manage a payment agreement.</p> <p>> Request Payment Agreement > Request Garnishment Voucher > Update Payment Agreement Bank</p>	<p>Registration Details</p> <p>Manage registration details.</p> <p>> Manage Names & Addresses > Update NAICS Code > Add/Update Officer > Add/Update Contact</p>	<p>Account Management</p> <p>Manage my account.</p> <p>> Register a New Tax Account > Request a Certificate of Clean Hands > Submit QHTC Self-Certification > Manage a Special Event</p>
<p>Bulk Processing</p> <p>Submit tax forms in bulk for other taxpayers.</p> <p>> Request Access to Bulk Filing</p>	<p>Access</p> <p>Manage access of accounts I have access to.</p> <p>> View Access > Manage Access > Register for DC Estate Tax Access</p>	<p>Quick Links</p> <p>I want to...</p> <p>> View FAQs > View Tutorials</p>



- Click the **Manage My Profile** hyperlink to view more self-service options for an account. On the next page you will be able to Manage Your Profile.



8. On the Manage My Profile page, you can make changes to your **Profile**, access your profile **Action Center**, and use the “**More**” tab to navigate to more self-service options. In this first example, we will click the **Profile** tab.
 - a. Clicking the **Profile** tab will allow you to update your account **Name**, change your **Email**, and edit your **Phone Number**.
 - b. You can also use this section to change your security settings. Use available hyperlinks to Change your **Password**, update your **Secret Question**, and Change your **Two-Step Settings**.



9. In our second example, we will click the **Action Center** tab.
 - a. Clicking the **Action Center** tab will allow you to view any unread messages by clicking “View Messages.”

Manage My Profile

 John Doe
john.doe@gmail.com

10

 Profile Action Center **More...**

What are you looking for?

Access Manage access of accounts I have access to. > Manage My Access > Manage Third Party Access > Request Third Party Access > Delete My Profile	Web Logons Manage web logons. > Add an Additional Logon > Manage Additional Logons	Payment Channels Manage my bank accounts used to make payments on MyTax.DC.gov. > Manage Payment Channels
Submissions Retrieve previously filed returns and requests. > Search Submissions	Messages View messages I've received from the Office of Tax and Revenue. > Send a Message > View Messages	Activity View my activity on mytaxdc.gov. > View Activity
Bulk Processing Submit tax forms in bulk for other taxpayers. > Request Access to Bulk Filing	Quick Links I want to... > View FAQs > View Tutorials	

 10a-
10c

 10d-
10f

 10g-
10h

10. In our third example, we will click the **More** tab. Clicking “More” will provide more self-service options so that you can manage **Access**, **Web Logons**, **Payment Channels**, **Submissions**, **Messages**, **Activity**, **Bulk Processing**, and **Quick Links**.

- a. Use the **Access** section to Manage access of accounts you have access to. Use available hyperlinks to “**Manage My Access**”, “**Manage Third Party Access**”, “**Request Third Party Access**”, “**Delete My Profile**”.
- b. Use the **Web Logons** section to manage web logons. Clicking on the available hyperlinks will allow you to “**Add an Additional Logon**” or “**Manage Additional Logons.**”
- c. The **Payment Channels** section will allow you to manage the bank accounts used to make payment on MyTax.DC.Gov. Click on the “**Manage Payment Channels**” hyperlink to make changes or setup a new payment channel.
- d. In the **Submissions** section, use the “**Search Submissions**” link to locate things you have submitted online for processing.
- e. Under the **Messages** section, click the **Send a Message** hyperlink to submit a question to OTR about your account. You can click “**View Messages**” to see previously sent messages and responses.
- f. Under the **Activity** section, click the “**View Activity**” link to review MyTax.DC.gov activity.
- g. In the **Bulk Processing** area, you can use the “**Request Access to Bulk Filing**” hyperlink to submit tax forms in bulk for other taxpayers.
- h. Use the Quick Links section to **View FAQs** and **View Tutorials**.